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ABSTRACT

Supporting performance objectives 21, 25, and 26 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on filing materials alphabetically by governmental rules are included in this packet. (The packet is the third in a set of nine on maintaining files and a library--CE 016 939-947.) The student materials include guidelines for filing governmental units, information on chronological filing, two student self-checks and a student activity (with answer keys), a check-out activity, and an instructor's final checklist. The instructor's manual includes directions for preparing the module for student use and an answer key for the final check-out activity. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the nine packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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ED155430

FILING ALPHABETICALLY

GOVERNMENTAL RULES

STUDENT'S MANUAL

Materials in this Lesson
have been

Modified by
Sadie McLeod

from
Materials Developed and Graciously Provided by
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and
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College of Education, University of Kentucky

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CE 010941

FILING ALPHABETICALLY—GOVERNMENTAL RULES**INTRODUCTION**

Many private companies conduct business with governmental agencies. These governmental agencies may be federal, county, city, or even foreign governments. An efficient secretary must be able to decide how to index and alphabetize such names for the files to be in correct order. You must also know what to do with items that are filed under the same name and how to properly put correspondence in a file folder. In this module you will learn how to handle these situations and will practice doing so.

DIRECTIONS

Before you start to work on this module, be sure that you have completed Module IVA, "Basic Alphabetic Filing," and Module IVB, "Specialized Alphabetic Filing."

After you have completed these modules, read the objectives below. Complete the learning activities in order to be able to perform the tasks given later. Complete the Learning Activities in the order given.

Criterion-Referenced Measure: Your instructor will provide you with file folders and 35 documents to be filed alphabetically and chronologically.

OBJECTIVE

(1) Given 35 documents with instructions for filing alphabetically, file the documents within the files alphabetically and chronologically within each individual folder. No more than 3 documents may be misfiled.

(2) Given 5 items (included in the 35 above) which require cross-references, prepare cross-reference sheets and file correctly.

LEARNING ACTIVITIES

- | | |
|--------------|---|
| READ | 1. STUDY Instruction Sheet I, GUIDELINES FOR FILING GOVERNMENTAL UNITS. |
| CHECK | 2. CHECK YOUR KNOWLEDGE of Filing Governmental items by completing Student Self-Check I, FILING GOVERNMENTAL UNITS. |
| READ | 3. STUDY Instruction Sheet II, CHRONOLOGICAL FILING. |
| CHECK | 4. CHECK YOUR KNOWLEDGE of Chronological Filing by completing Student Self-Check II. |
| READ | 5. COMPLETE Instruction Sheet III, PRACTICE FILING, using Letters P-1 through P-15. |
| CHECK | 6. ARRANGE with your instructor to complete this module by performing the Check-Out Activities. |

Instruction Sheet I

GUIDELINES FOR FILING GOVERNMENTAL UNITS

Standard guidelines are necessary for everyone in the office to correctly and efficiently use the file. These guidelines will help you decide how to file governmental units.

1. United States (Federal Government) committees, offices and agencies should always be indexed under "United States Government" as the first three units, then subdivided by department, bureau, division, location, or title. Such words as Department of, Bureau of, Division of, etc. are not indexing units and are placed in parenthesis below the word it describes.

EXAMPLES: U. S. Department of Commerce Bureau of Census
 United States Government Commerce Census
 (Dept. of) (Bureau of)

2. Local Governmental units— State, County, City, Town, etc.

- a) These areas of governmental bodies must always be indexed first under the name of the state, city, county, or municipal title.
- b) If the title is not in correct arrangement, rearrangement must be made so the location is the first indexing unit(s).
- c) All location titles must have the word state, city, county, etc. included so that duplicate names of different areas of government are not mixed.

EXAMPLES:

Kentucky Department of Education

Kentucky State Education
 (Dept. of)

Florence Water Department

Florence City Water
 (Dept.)

Bureau of Weights & Measures
 State of Virginia

Virginia State Weights Measures
 (and) (Bureau of)

Police Department
 Boone County, Kentucky

Boone County Police
 (Ky.) (Dept.)

INSTRUCTION SHEET I (cont'd.)

3. Foreign Governmental Units

- a) These items should be indexed first by the country's name, then subdivided by department, bureau, division, etc.
- b) If it is not a governmental name, do not rearrange and consider such phrases as Committee, Board, Bureau, etc.

EXAMPLES:

Bureau of Health Research, Inc.

Bureau Health Research Incorporated
(of)Republic of Finland
Department of JusticeFinland Justice
(Republic of) (Department of)Bureau of Trade Promotion
Republic of HaitiHaiti Trade Promotion
(Republic of) (Bureau of)

Student Self-Check I

FILING GOVERNMENTAL UNITS

On a separate sheet of paper, index the following names by writing in the correct order and placing the number above each unit. Place in parentheses the nonindexing units. Alphabetize each section by placing a number to the left of the name to indicate the correct order. Use the format below as a guide; do not write on this sheet. The first one is done as an example. When you are finished, check your answers by page 61.

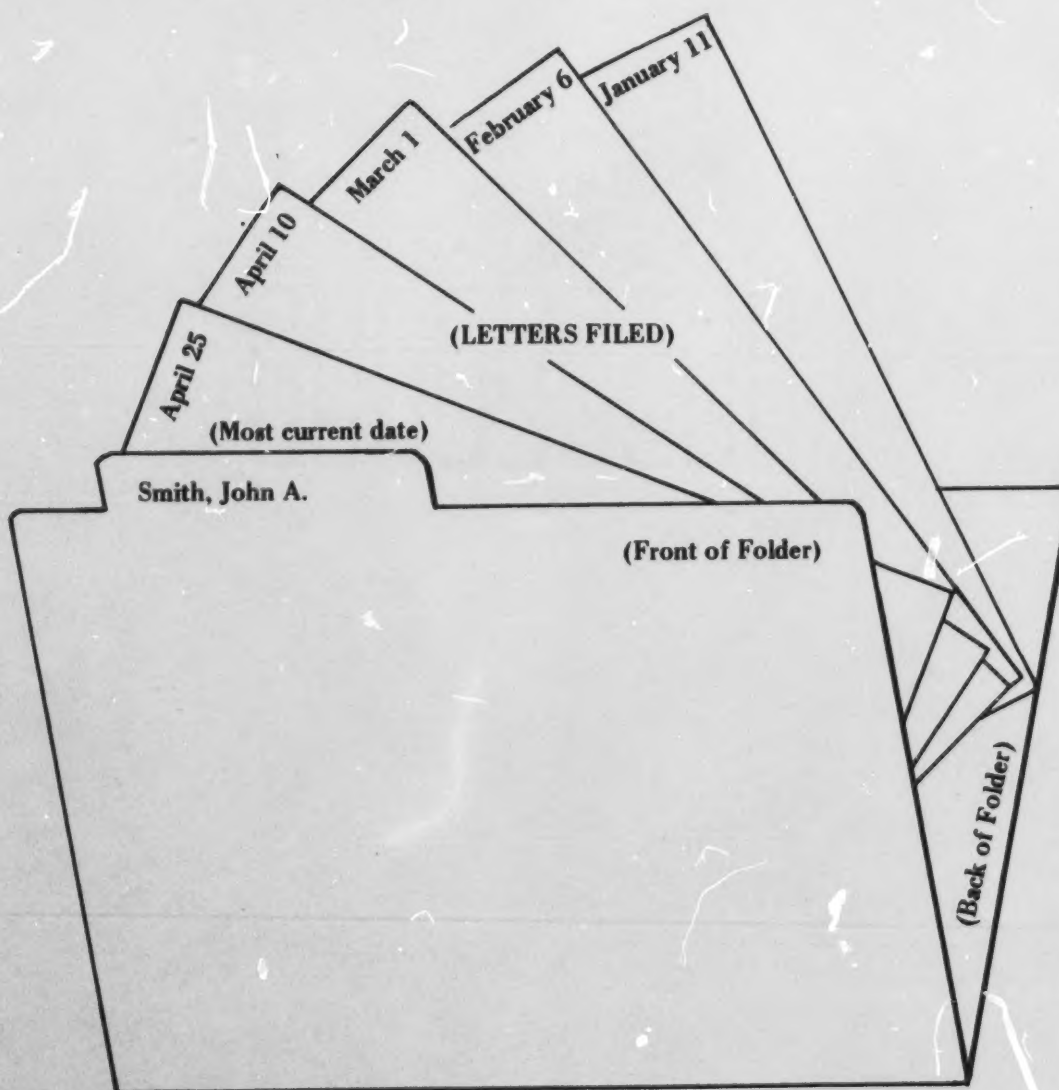
- _____ ¹ 1. U. S. Department of Agriculture
 Agricultural Marketing Service
- _____ U. S. Secretary of Defense
 Department of the Army
- _____ Department of Health, Education, & Welfare
 Food and Drug Administration
- _____ 2. Fayette County Board of Education
- _____ Virginia Department of Agriculture
- _____ City of Versaille Fire Department
- _____ Ohio National Guard
- _____ 3. Committee for Child Protection
- _____ U. S. Department of Labor
 Bureau of Labor Statistics
- _____ United States Shoe Co.
- _____ Republic of Panama
 Department of Justice
- United States Government Agriculture*
Agricultural Marketing Service (Dept. 8)

Instruction Sheet II
CHRONOLOGICAL FILING

Occasionally you may receive several items of correspondence from the same person or business. When this occurs, you must arrange the items chronologically (by date), with the most current date in the front of the folder.

EXAMPLE: April 11 would be in front of March 20 of the same year.

FILE FOLDER: Letters received on January 11, 19--; February 6, 19--;
March 1, 19--; April 10, 19--; April 25, 19--



Student Self-Check II

CHRONOLOGICAL FILING

On a plain sheet of paper, index the following names by placing the correct number above each unit. Then alphabetize the names by placing a number to the left of the name to indicate the correct order. The date of the correspondence is given to the right of each name. When you are finished, check your answers on page 62.

Howard E. Johnson	December 21, 19--
Howard E. Johnson	March 2, 19--
Howard P. Johnson	April 1, 19--
H. L. Johnson	January 1, 19--
Jack K. Johnson	July 6, 19--
Joseph M. Johnson	August 31, 19--
L. M. Johnson	August 31, 19--
Jack K. Johnson	June 21, 19--
Howard E. Johnson	May 15, 19--

Instruction Sheet III

PRACTICE FILING

Index and alphabetize the items of correspondence labeled P-1 through P-15. The letters represent a sample of incoming and outgoing correspondence for Burns and Carter Department Store, 129 Chandler Rd., Lexington, KY 40502, the company for whom you work. Remember you will not file under your company name.

Obtain cross reference sheets from your instructor and use them where necessary. If letter P-2 needs a cross reference, assign the number P-2X to the cross reference sheet. For example: Letter addressed to Mrs. Edward McMillan, salutation is Dear Jane.

P-2 McMillan, Jane (Mrs.)
(Edward)

P-2X McMillan, Edward (Mrs.)
SEE: McMillan, Jane (Mrs.)

File the letters and cross reference sheets in the proper file folders. When you have the letters in the correct order, place the number of the letter and the indexed units in the proper sequence on a separate sheet of paper. Use the format below as a guide; the first one is done for you. When you have finished, check your answers on page 63. Be sure to keep the letters in a safe place for use in future modules. Also read pages 210-212 in *Clerical Office Procedures*, Fifth Edition, Meehan, Paseward, Oliverio, South-Western.

Alpha
Number

1.

Letter
Number

P-4

Name and Indexing Units

1 2 3

Adams Furniture Company

P-1

August 13, 19--

New Free Press
1133 State Street
Philadelphia, PA 19104

Gentlemen:

Thank you for your request for our catalog. It was mailed by 5 p.m. the day your request was received.

C
O
P
Y

A new edition of our catalog has just come off the press. It contains our latest prices, discounts, and other information about our products. You will be amazed to see how few of our products have increased in price. Shopping from this catalog will help you to increase your profits.

I think you will find our catalog the one for which you have been looking. It contains many new items at prices that will be very attractive to you. For faster service refer to your account number, 4-11-09, when ordering.

Sincerely yours,

Howard E. Carter
Sales Manager

rb

P-2

June 21, 19--

Mrs. John McWilliams
3913 Woodland Park Drive
Biloxi, MS 39511

Dear Karen:

C

As you requested in your letter of June 1, we are canceling the charge for the merchandise you ordered. Our check for \$15.25 is enclosed. Since your cancellation arrived after shipment had been made, please return the merchandise to us when it arrives.

C

P

Y

You asked us to include in our refund the amount of 20 cents that you said was due you from a previous order. After we checked our records, we found that your account number 5-11-10 has a balance of 25 cents in our favor. We are canceling the charge in order to do away with the necessity for any further correspondence. We hope that we may have an opportunity in the future to serve you.

Cordially yours,

George P. Burns
President

b

Enclosure

T - H WHOLESALE CO.

500 Greenwood Road, Chattanooga, TN 37027

P.3

April 29, 19--

Mr. George P. Burns
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

Reference: Account No. 6-11-01

Thank you for your inquiry about our office furniture. The desk I would recommend for you has seven drawers. We also have a very comfortable chair to match. We have a desk and chair that will be satisfactory for your secretary, too.

You will find pictures of these pieces of office furniture in the enclosed pamphlet. Before you make a decision, we suggest that you stop at our showroom on 418 West Street to see these pieces. The showroom is open weekdays until four o'clock. I hope you will let us serve you.

Sincerely,

A. J. Brown

A. J. Brown
Sales Manager

rb

Enclosure

ADAMS FURNITURE CO.

1901 Miller Road, Huntington WV 25701

P-4

March 1, 19--

Mr. George P. Burns, President
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

We are sorry that financial difficulties have made it impossible for you to pay your bill for books, supplies, and equipment that you purchased several months ago. Because of your fine record of payment in the past, we are delighted to grant your request to pay your balance in four monthly payments. Your first payment is due on March 10.

We would have gladly make special arrangements for you had you written sooner about your situation. Your credit rating with us is very high.

Very truly yours,

Elizabeth Adams

Elizabeth Adams
President

rb

P-5

September 1, 19--

Wichita Insurance Company
700 Eastside Drive
Wichita Falls, TX 76301

Gentlemen:

C Thank you for the survey you made of our fire sprinkler system.
I appreciate the efficient way in which your men went about the
task.

O We have decided to accept your recommendations and install the
P equipment you suggested. A copy of your suggested articles is
attached.

Y I would like to have the items delivered between 10 a.m. and 2 p.m.
on September 20. Please deliver these to our central room on the
third floor. Thank you once again for your help.

Very truly yours,

George P. Burns
President

rb

Enc.

P-6

May 1, 19--

Norwood Nursing Home
726 Freeland Drive
Norwood, VA 24401

Gentlemen:

C Our annual inventory sale will begin the 15th of May. We are
O holding a private sale on May 15 and May 16 as a special service
P to our established customers. We wish to give you an opportunity
Y to select what you want before the goods are offered to the general
public.

Do not fail to take advantage of this special sale. Remember to
use your account number when placing an order.

Sincerely yours,

Howard E. Carter
Sales Manager

rb

P-7

August 21, 19--

G. M. Xavier, Jr.
940 Eastland Terrace
Cincinnati, OH 45230

Dear Mr. Xavier:

C We are pleased to hear that you are transferring your business
O to Lexington and are confident that you are making a wise
P business move. Lexington has many advantages for a business.
Y You will not regret making this move.

P We were also happy to know that our store has been recommended
Y to you for supplies. It has always been our policy to serve
our customers in every way possible.

We look forward to doing business with you. For quick service
when ordering, use account number 6-11-25.

Cordially yours,

Howard E. Carter
Sales Manager

rb

P-8

December 29, 19--

Dr. G. M. Xavier
19 Laura Lane
Cincinnati, OH 45233

Dear Dr. Xavier:

C
O
P
Y

Please pardon the delay in answering your letter of November 15. I have been away on a business trip for the past month, and this is the first opportunity I have had to write you.

The people you sent us have done satisfactory work in the positions to which they were assigned. They were placed as file clerks, typists, and bookkeepers. It is impossible for me to point out individual weaknesses of the workers.

The employees you sent us have been well trained. Please continue to recommend your fine students to us for employment. It has always been easy to place your people in good jobs.

Sincerely yours,

George P. Burns
President

rb

P-9

September 1, 19--

Station Travel Agency
11 Secluded Circle
Ogden, VT 84403

Gentlemen:

C My plans have been changed since I wrote you about my proposed trip
O from Lexington, KY to Ogden, VT. I shall now have to leave on
P September 8 instead of leaving on the 15th of September. Would you
Y please reserve a lower berth for me from Lexington to Ogden for
September 8. I should like to take a train that leaves about six
o'clock in the evening.

I still plan to return on September 18. I should like to leave
around 8 p.m. I shall send someone to pick up the tickets as soon
as I hear from you. Thank you for taking care of this matter.

Sincerely yours,

George P. Burns
President

rb

P-10

May 1, 19--

West Virginia Department of Education
Central Store
278 Court Circle
Charleston, WV 26070

Gentlemen:

C Our annual inventory sale will begin the 16th of May. We are
O holding a private sale on May 16 and 17 as a special service to
P our established customers. We wish to give you an opportunity
Y to select what you want before the goods are offered to the
general public.

Do not fail to take advantage of this special sale. Remember to
use your account number when placing an order.

Sincerely yours,

Howard E. Carter
Sales Manager

rb

P-11

March 7, 19--

Dr. Charles Smith-Gibson
114 Tulip Lane
Green Bay, WI 54303

Dear Dr. Smith-Gibson:

C We should like very much to be one of the first to welcome
O you to our city.
P

Y It is only natural that you may be homesick for the faces
and places of the town that was once your home, but we
hope you will learn to love our lakes and parks as well.
You will want to discover the attractions of the city
for yourself. We wish to help you discover the attractions
of the Burns & Carter Department Store.

Our location is very convenient and is served by the
city bus line. Visit us any week day between the hours
of nine o'clock and five o'clock. Use your account
number, 6-11-11, for fast service.

Sincerely yours,

Howard E. Carter
Sales Manager

rb

SMITH-GIBSON

WHOLESALE OUTLET

56901 Irish Acres, Great Falls MT 59403

P-12

December 1, 19--

Mr. George P. Burns, President
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

A good label is important on any item of clothing. It is doubly important for a Christmas present. The Roger label on any clothing item you select for a man or a boy tells him instantly that the style is correct, that the materials are of fine quality, and that the workmanship is the best. Why not give Roger clothes for Christmas this year.

Give our gift certificates if you really want to impress someone. A small fee of 15 cents is charged for each gift certificate. This is an easy way to dispose of your shopping problems.

Cordially yours,

George S. Smith

George S. Smith
Sales Manager

rb

A. R. ROBBINS
337 Marion Ave.
Atlantic City, NY 08401

P-13

June 29, 19--

Mr. Howard E. Carter
Sales Manager
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Carter:

I am very much afraid someone has made a serious mistake regarding the balance that you say is due your store. I sent you a check for \$47.50 in full settlement of my account, No. 4-11-23, on May 15, 19--. I have the canceled check in my files.

This is the second time that I have received a letter threatening me with legal action after I had already paid my bills. I do not enjoy receiving such letters; however, I think that I have been very patient up to now. I shall take my trade to some other store if this happens again.

Yours truly,

A. R. Robbins

rb

P-14

February 21, 19--

Mr. Alfred P. Robbins
129 Atlantic Drive
Stanton, RI 02882

Dear Mr. Robbins:

C

We should like very much to be one of the first to welcome you to our city.

O

P

Y

It is only natural that you may be homesick for the faces and places of the town that was once your home, but we hope you will learn to love our lakes and parks. You will want to discover the attractions of the city for yourself. We wish to help you discover the attractions of the Burns & Carter Department Store.

Our location is very convenient and is served by the city bus line. Visit us any day between the hours of nine and five o'clock. Use your account number, 4-11-19, for fast service. We look forward to serving you in the near future.

Sincerely yours,

Howard E. Carter
Sales Manager

rb

SMITH-GIBSON WHOLESALE OUTLET

56901 Irish Acres
Great Falls, MT 59403

P-15

April 23, 19--

Mr. George P. Burns, President
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

This letter is being sent special delivery in order to reach you before you leave for New York. I had planned to be in New York during the week of April 10, but have had to change my plans. Problems in the factory prevent us from placing our new washing machine on the market for another year. I shall spend the week of April 10 at the factory attempting to get the problems under control.

You can plan to see me during the week of May 17. I shall be in my New York office by 9 a.m. every day that week.

Cordially yours,

George G. Smith
Sales Manager

rb

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. Complete each activity and submit your work to your instructor who will evaluate it using the Instructor's Final Checklist, ALPHABETIC FILING INCLUDING GOVERNMENTAL UNITS.

Index and alphabetize on a separate sheet the 35 items of correspondence labeled F-1 through F-35. The 35 letters represent a sample of incoming and outgoing correspondence for Burns and Carter Department Store, 125 Chandler Road, Lexington, KY 40502. Since you work in this office, you will not file under your company name.

Be sure to prepare cross reference sheets where necessary. Obtain the cross reference sheets from your instructor. If letter F-2 needs a cross reference, assign the number F-2X to the cross reference sheet.

Alphabetize all letters and cross reference sheets. When you have the items in the correct order, place the letter number and indexed name (with the unit number written above the appropriate name) in the proper sequence on a sheet of plain paper using the format below as a guide. Then, file the letters and cross reference sheets in the folder your instructor has provided.

When you are finished, submit your files and answer sheet to your instructor for approval. **MAKE SURE YOU KEEP THESE LETTERS IN A SAFE PLACE TO USE IN FUTURE MODULES.**

Alphabetic
Order

Letter
Number

Name and Indexing Units

OPTIONAL:

After your instructor has evaluated your work, you may be given a timed retrieval test on letters filed.

F-1

October 23, 19--

Mr. Shawn J. McCool
333 Malibu Road
Charleston, WV 29561

Dear Mr. McCool:

C Thank you for your letter of October 18 inquiring about the
O credit of \$10.83 that should have been made to your account,
P No. 4-11-08.
Y

We have checked our records and find that a credit slip was
issued to you on October 3. However, since the sales
clerk did not record your account number on the slip,
we were delayed in giving you proper credit. Our monthly
statements were mailed October 8, before your account
could be charged properly.

We have adjusted your account for the \$10.83 credit, so
your account balance is now \$22.18. If you have further
questions concerning this matter, please contact me at once.

Very truly yours,

Howard E. Carter
Sales Manager

rb

F-2

October 25, 19--

Mr. J. E. Northcutt
999 Spring Garden Road
Franklin, MS 39211

Dear Mr. Northcutt:

C Thank you for your letter of October 18 inquiring
O about the credit of \$10.83 that should have been made to
P your account, No. 5-11-07.
Y

 We have checked our records and find that a credit
 slip was issued to you on October 9. However, since the
 sales clerk did not record your account number on the
 slip, we were delayed in giving you proper credit. Our
 monthly statements were mailed before your account could
 be charged properly.

 We have adjusted your account for the \$10.83 credit,
 so your account balance is now \$22.18. If you have further
 questions concerning this matter, please contact me at once.

Very truly yours,

Howard E. Carter
Sales Manager

rb

F-3

October 20, 19--

Mrs. Damon O'Bryan
2555 Habershorn Street
Jersey City, NJ 07104

Dear Mrs. O'Bryan:

C
O
P
Y

We received your check, No. 456, for \$10 dated October 14, 19--. However, you did not indicate to what the money is to be credited.

We have a lay-away in your name on which \$10 monthly payments are made. We also have a regular charge account, No. 5-11-26, on which your payment for the month of October is \$10.

Would you please contact us immediately telling us how the above check is to be used.

Very truly yours,

Howard E. Carter
Sales Manager

rb

F-4

November 3, 19--

Mr. Tom Pain
2500 Kenosha Avenue
Lubbock, TX 79410

Dear Mr. Pain:

C Thank you for your request that we change your maximum
O amount of charge from \$100 to \$300. We have checked our
P records and found that we have sufficient information to
Y enable us to increase your charge amount at this time.

We are glad you enjoy shopping at Burns and Carter. We
offer many unadvertised specials for the benefit of our
regular shoppers and try in every way to make shopping a
real pleasure.

We are now stocking our shelves for Christmas. Perhaps
you can come in soon and make use of our special Christmas
lay-away plan.

Very truly yours,

Howard E. Carter
Sales Manager

rb

F-5

July 14, 19--

Mrs. Mary Jane Peyton
3468 Lawrence Avenue
Uniontown, PA 17104

Dear Mrs. Peyton:

C We appreciate your letter asking us to stock McCall's
Patterns. Yours was one of many such requests.

O We contacted the McCall Pattern Company in June and
P have made arrangements to have in stock by November 1
a complete supply of McCall's patterns.

Y We are pleased to offer you the service of shopping
for your McCall's patterns. Please order often and
don't forget your account no., 5-11-03, for prompt
service.

Very truly yours,

Howard E. Carter
Sales Manager

rb

F-6

October 25, 19--

R. M. Bakery
196 Rebel Drive
Petersburg, VA 24657

Gentlemen:

C
O
P
Y

We received your check No. 165 for \$50 dated October 20. You did not indicate your account number, and we cannot find an account listed in your name at the above address. Therefore, we are not able to credit your account for the \$50.

Would you please contact us at once stating your account number. Also if you have recently changed addresses, let us know so that we can keep our records up to date.

We are holding the above check until we hear from you.

Very truly yours,

Howard E. Carter
Sales Manager

rb

F-7

October 1, 19--

Mr. James Northcutt
3468 Lawrence Avenue
Baltimore, MD 21651

Dear Mr. Northcutt:

We received your check No. 432 for \$20 dated September 28, 19--.

C

We are applying the above amount to your account No. 5-11-13.
You have a balance of \$80 on your account as of today.

O

P

Thank you very much for your prompt payments.

Y

Very truly yours,

Howard E. Carter
Sales Manager

rb

NORTH CAROLINA CARPET CO.

220 Karenstone Drive
Charlotte, NC 28215

F-8

November 12, 19--

Mr. George P. Burns, President
Burns and Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

Would it be possible for you to postpone your visit to our store one week? I expect to be out of town the week of November 22, but I will be back on November 29 and will be able to see you any time after that date.

I hope this change in plans will not inconvenience you.

We are expecting good business in carpet sales in the months ahead, so we may have some good news for you on your visit.

Very truly yours,

A. R. Kaiser

A. R. Kaiser
President

rb

F-9

April 15, 19--

Mr. Thos. R. Smythe
234 Revolution Street
Lexington, VT 05672

Dear Mr. Smythe:

C
O
P
Y

When you opened account number 6-11-15 with us, it was agreed that you would pay the account in full each month. We realize, therefore, that there must be some reason why payment has not been made as agreed. Won't you tell us exactly why payment hasn't been made, so we may arrange to cooperate with you and help you fulfill your obligation?

At the present time, your account is in arrears to the point that we must ask you to refrain from using your charge-a-plate. Store policy prohibits us from authorizing any further charges as long as your account remains in a delinquent status.

We appreciate your patronage and wish to continue to serve you; however, if satisfactory arrangements cannot be made within a reasonable length of time, we will have no choice but to ask you to return your plate to our office and close your account permanently.

We will be glad to answer any questions that you may have. Please contact us at our Lexington office. Phone: 278-5000.

Very truly yours,

Collection Department

rb

F-10

March 23, 19--

Mr. Robt. M. Rollins
2077 West Tenth Street
Hastings, SD 57724

Dear Mr. Rollins:

PAYMENT DUE: \$29.85

C
O
P
Y

When you opened your account number 6-11-5 with us, you agreed to pay promptly each month. No doubt there is some reason why payment has not been made as you agreed.

Will you tell us exactly why payment hasn't been made, so we can help you to fulfill your obligation?

We do not wish to annoy you with unpleasant correspondence and feel sure you will appreciate our position in seeking your cooperation.

Very turly yours,

Collection Department
Telephone: 278-5000

rb

MAIN FLORIST & GIFT SHOP
189 Main Street, New York, NY 10007

F-11

May 2, 19--

Mr. George P. Burns, President
Burns and Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear George:

To date I have written Casey Barrymore concerning his request to display his wildlife prints in our store. I informed him that we can give space for several prints, but that we cannot afford him the space for a personal reception until after June 1.

Since Mr. Barrymore was quite interested in our store handling his pictures, he will probably be contacting us very soon. He is one of the most talented artists from the Blue Grass Region. I feel his work will be in great demand by the public.

I hope you will be able to view the display. I will get back to you later when a definite date has been set.

Cordially,

Anthony P. Wells
Anthony P. Wells

ROLLINS PRINTING CO.

720 Madison Court, Hampton, VA 23657

F-12

October 23, 19--

Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Gentlemen:

Please send a copy of your current catalog. We are especially interested in your selection of office products as we are currently doing some remodeling.

For your records, our account number is 6-11-17.

Sincerely,

John R. Richards

John R. Richards
Purchasing Agent

MAIN FLORIST & GIFT SHOP
189 Main Street, New York, NY 10007

F-13

May 20, 19--

Mr. George P. Burns, President
Burns and Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear George:

We have finally set a date for Casey Barrymore's display of his wildlife prints. The prints will be on display June 20 through June 27.

I hope you will be here for the opening so you will get first choice for your customers.

See if you can arrange a few days for vacation while you are here. We'll try to get in a little golf.

Hope to see you soon.

Cordially,

Anthony P. Wells
Anthony P. Wells

rb

F-14

August 14, 19--

San Diego Dancers, Inc.
1699 Allesandro Street
San Diego, NM 87745

Gentlemen:

C

Thank you for your credit application with Burns and Carter.
It is our pleasure when we can make shopping more convenient
for our customers. The Burns and Carter charge plate does
just that.

O

P

Y

We have examined your application for credit but cannot extend
our credit services until we obtain additional information from
you. Would you please complete the blanks marked in red and
return the application to us in the enclosed self-addressed
envelope.

Your application will receive our prompt attention. We hope to
assign your account number by the first of next month.

Very truly yours,

Howard E. Carter
Sales Manager

rb

Enclosures

F-15

October 13, 19--

Mr. Charles Sutter-Smith
211 Stone Mill Road
Knoxville, TN 37919

Dear Mr. Sutter-Smith:

C
O
P
Y

Thank you for applying for a Burns and Carter charge plate. As a part of processing credit applications, we always check an applicant's record with the Credit Bureau. We did not receive a favorable report for you, Mr. Sutter-Smith. It seems you have unpaid bills that are several years overdue.

We are sure there is a reason for your credit record; however, until the Bureau can give us a report that meets our store requirements, we cannot extend credit service to you.

However, Mr. Sutter-Smith, we hope you will continue to order from Burns and Carter and will take advantage of our "cash only" bargains, plus the many other specials we have each week for our customers.

Very truly yours,

George P. Burns
President

rb

13th STREET ANTIQUE SHOP
129 Thirteenth Street, Greenville, SC 29670

F-16

November 23, 19--

Burns and Carter Department Store
129 Chandler Road
Lexington, KY 40502

Gentlemen:

On October 20 I wrote you asking for copies of any past-due, unpaid invoices dated October 1, 19--, and prior. To date I have had no indication that you received my correspondence.

Therefore, I will appreciate a prompt response from you concerning the above request. As you are aware, the auditors will check our books shortly after the first of the year. We like to have our records accurate and up to date at that time.

Your prompt cooperation will be greatly appreciated. For your reference our account number is 6-11-22.

Yours very truly,

Rebecca P. Keeton

Rebecca P. Keeton
President

at

THOMAS' DEPARTMENT STORE

3497 Wheeler St., Houston, TX 77004

F-17

October 31, 19--

Burns and Carter Department Store
129 Chandler Road
Lexington, KY 40502

Gentlemen:

We have not received the merchandise covered in your Invoice No. 12897 dated October 27, in the amount of \$1,899.50. The merchandise on this invoice was intended for Department 20.

Please send us Proof of Delivery. For reference, our account number is 6-11-23.

Sincerely yours,

Allen E. Thomas

Allen E. Thomas
President

rb

F-18

October 15, 19--

Dr. Norman Welsh
12101 Reading Road
Cincinnati, OH 45241

Dear Dr. Welsh:

C
O
P
Y

We at Burns and Carter's are pleased that members of your class want to visit our store and to observe work being carried on in our office. Mr. Boland, our personnel manager, has made arrangements for your class to be shown through our facilities by experienced guides.

The tours will begin from the employees' party room on the second floor at 10 and 10:15 a.m. By arranging the tours in two small groups, each student will have a better opportunity to see all that is taking place and to ask questions as they arise.

Upon completion of the tour of our store, refreshments will be served while the members watch a short film giving additional information about our store. Mr. Boland will also be present to answer any question your members may have.

We shall look forward to having your class visit us and hope you enjoy your tour.

Very truly yours,

George P. Burns
President

rb

F.19

August 13, 19--

Mr. Felix Unger
129 Capital Street
Toledo, OH 43605

Dear Mr. Unger:

C
O
P
Y

Burns and Carter's is hoping this has been a very successful year so far. We are now offering a special Junior Charge Account. This charge account will be your very own, thus enabling you to establish a credit rating that can be of help to you in the future. You can enjoy a charge account's convenience while paving the way for a brighter future.

Our special Junior Charge Account will allow you credit up to \$100. Payments can be arranged in easy monthly installments.

Burns and Carter's is a store on which you can depend. We can even supply that little something just right for you.

Why not get started today on your personal charge account. Just fill out the enclosed application, obtain the proper signatures, and return to us in the postage-paid envelope. We will process your application immediately and have your charge card to you very soon.

Very truly yours,

Howard E. Carter
Sales Manager

rb

Enclosure

F-20

June 3, 19--

Mr. Anthony P. Wells
Main Florist and Gift Shop
189 Main Street
New York, NY 10007

Dear Tony:

C Vacation with business sounds like a good idea.

O I plan on seeing the Barrymore Display and will arrive
at Kennedy International Airport on June 19 at 8:30 p.m.
P I will see you on the 20th at the display, and we can
make plans for golfing at that time.

Y See you soon.

Cordially,

George P. Burns

rb

FIRST NATIONAL BANK

2568 Old Hickory Boulevard
Nashville, TN 37221

F-21

December 20, 19--

Burns & Carter Department Store
129 Chandler Avenue
Lexington, KY 40502

Gentlemen:

Thank you once again for your confidence in the Regional Office of the First National Bank. You have helped to make this past year one of the most profitable in our history by your good banking record with us, your cooperation in paying your notes, and your many excellent suggestions.

It is our hope that we can increase our usefulness to you in the coming year. We hope you will always feel free to tell us how we can improve our services.

You have our sincere wish that the coming year will be a pleasant and happy one for you and those close to you.

Sincerely yours,

Gerald A. Lane

Gerald A. Lane
Regional President

rb

F-22

October 23, 19--

Silver Grove Fire Department
16 River Road
Silver Grove, VT 84121

Gentlemen:

C Thank you for your request that we change your maximum
O amount of charge from \$100 to \$300. We have checked our
P records and find that we have sufficient information to
enable us to increase your charge amount at this time.

Y We are glad you enjoy shopping at Burns and Carter. We
offer many unadvertised specials for the benefit of our
regular shoppers and try in every way to make shopping a
real pleasure.

We are now stocking our shelves for Christmas. Perhaps you
can come in soon and make use of our special Christmas
lay-away plan.

Very truly yours,

Howard E. Carter
Sales Manager

FD

R-M BAKERY

128 Lee Road
Petersburg, VA 24657

F-23

August 31, 19--

Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Gentlemen:

Please send us your current catalogue. We are especially interested in your selection of office products since we are currently doing some remodeling.

Sincerely,

Ann R. Richards

Ann R. Richards
Purchasing Agent

rb

F-24

November 5, 19--

Fraternal Order of Police
20 Algiers Court
Washington, D.C. 20031

Gentlemen:

C Your account shows that it has not been used for over 18
O months. We are very much concerned about the discontinued
patronage of any of our customers and always want to know the
cause.

P If our merchandise or service has not been of the quality
Y you expect, won't you please tell us immediately so that
we can take the necessary steps to correct this. We
welcome your comments, criticisms, and suggestions. After
all, we can serve our customers better when we know exactly
what they want.

Now is a good time of year to place an order since we are
featuring many special items at discount prices. With
the Christmas Season approaching, you may find our Christmas
Boutique in our special catalog very interesting.

We are expecting to hear from you very soon with a note
about our service or merchandise. For a guarantee of
quick service don't forget to use your account number.

Sincerely yours,

Howard E. Carter
Sales Manager

rb

STOCKTON COMMUNICATIONS

CO., INC.

18 Hollister Boulevard, Stockton, RI 02919

F-25

April 12, 19--

Mr. George P. Burns, President
Burns and Carter Department Store
129 Chandler Road
Lexington, KY 40502

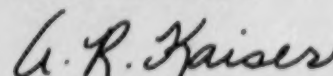
Dear Mr. Burns:

Would it be possible for you to postpone your visit to our store one week? I expect to be out of town the week of April 22, but will be back on April 29 and can see you anytime after that date.

I hope this change in plans will not inconvenience you.

We are expecting good business in communication sales in the months ahead, so we may have good news for you on your visit.

Very truly yours,



A. R. Kaiser
President

rb

F-26

November 12, 19--

Mr. Roger Van Camp, President
Van Camp's Farm Equipment Co.
3216 New Circle Road
Lexington, VT 05672

Dear Mr. Van Camp:

C Thank you for your credit application with Burns & Carter.
O It is a pleasure when we can make shopping more convenient
 for our customers. The Burns and Carter charge plate does
 just that.

P We have examined your application for credit but cannot
Y extend our credit services until we obtain additional
 information from you. Would you please fill in the
 blanks marked in red and return the application to us in
 the enclosed self-addressed envelope.

Your application will receive our prompt attention. We hope
to assign your account number by the first of next month.

Very truly yours,

Howard E. Carter
Sales Manager

rb

Enclosures

X-CEL HOME DECORATORS
305 Overton Street, St. Louis, MO 63117

F-27

December 10, 19--

Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

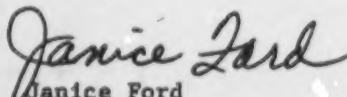
Gentlemen:

On November 10, I wrote you asking for copies of any past-due, unpaid invoices dated November 1, 19-- and before. To date, I have had no indication you received my correspondence.

Therefore, I will appreciate a prompt response from you concerning the above request. As you are well aware, the auditors will check our books shortly after the first of the year. We like to have our records accurate and up to date at that time.

Your prompt cooperation will be greatly appreciated. For your reference our account number is 5-11-25.

Yours very truly,


Janice Ford
President

rb

CHARLES SUTTER-SMITH
PUBLISHING CO.

129 Hardrock Road, Knoxville, TN 37919

F-28

October 31, 19--

Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Gentlemen:

We have not yet received the merchandise covered in your Invoice No. 12898 dated October 27 in the amount of \$109.52. The merchandise on this invoice was intended for Department 20.

Please send us a copy of your proof of delivery slip. For reference, our account No. is 4-11-27.

Sincerely yours,

Charles Sutter-Smith

Charles Sutter-Smith
President

rb

QUEEN ANNE STEAM LINE

128 Seashore Lane
Atlantic City, NY 08402

F-29

July 20, 19--

Mr. George P. Burns, President
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

I am pleased to send you under separate cover the brochures
you requested in our phone conversation today.

Our agency will be most happy to assist you in planning a
vacation that you and your family will enjoy. We look forward
to hearing from you soon.

Sincerely,

Catherine Rudd

Catherine Rudd
Sales Manager

rb

F-30

January 21, 19--

Modern Office Procedures
1866 Emerson Place
Seattle, WA 98119

Gentlemen:

C According to our records we have paid for your magazine
O through June 19--. However, we have not received the past
P two issues.

Y Please check your records to see if these issues have been
mailed since we consider this a worthwhile investment of our
money. I look forward to receiving the two issues soon.

Sincerely,

George P. Burns
President

rb

ST. WILLIAMS CHURCH
67 Beech Drive
Oklahoma City, OK 74138

F-31

September 21, 19--

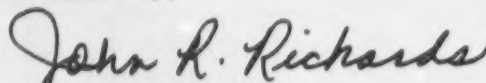
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Gentlemen:

Please send us your current catalog. We are especially interested in your selection of office products as we are currently involved in some remodeling.

For your records our account number is 4-11-24.

Sincerely,



John R. Richards
Purchasing Agent

S. C. DEPARTMENT OF TREASURER

89 Mansell Street
Greenville, SC 29610

F-32

April 3, 19--

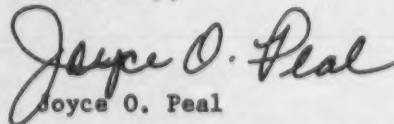
Mr. George P. Burns, President
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

Enclosed please find the information you requested in your
letter of March 2.

Remember the deadline for business tax returns in this state
is May 15.

Sincerely,


Joyce O. Peal

rb

ROU~~ND~~TOWN BUS STATION

129 Liberty Street, Philadelphia, PA 17100

F-33

July 17, 19--

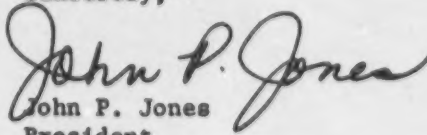
Mr. George P. Burns, President
Burns & Carter Department Store
129 Chandler Road
Lexington, KY 40502

Dear Mr. Burns:

Enclosed please find the brochures you asked us to send you.

We hope you will be able to use our bus tour service while
visiting Philadelphia.

Sincerely,


John P. Jones
President

rb

Enclosures

F-34

March 2, 19--

S. C. Department of the Treasurer
89 Mansell Street
Greenville, SC 29610

Gentlemen:

C
O
P
Y

Please send us a copy of your regulations for filing state income tax.

We have a branch store in your state and need this information for our tax returns.

Sincerely,

George P. Burns
President

rb

F-35

February 23, 19--

U. S. Department of Interior
Bureau of Environmental Protection
129 Vine Street
Cincinnati, OH 45202

Gentlemen:

C A group of citizens in Kentucky is very concerned about en-
O vironmental protection. Please send us any brochures you have
P that would help our Chamber of Commerce make the public more
Y aware of this problem.
Any other assistance you can give us in this matter will be
greatly appreciated.

Sincerely yours,

George P. Burns
President

rb

LAP

Student _____

Date _____

FILING ALPHABETICALLY – GOVERNMENTAL RULES**Instructor's Final Checklist**

Check the student's performance in the following elements of filing governmental rules alphabetically.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

Student Performance			
Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished

1. The student indexed names correctly in preparing for filing
2. The student alphabetized names correctly in filing
3. The student prepared cross reference sheets where necessary
4. The student correctly evaluated his/her own work after each self-check

[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]
[]	[]	[]	[]

Student Self-Check I

FILING GOVERNMENTAL UNITS

ANSWER KEY

1. (1) ¹ United ² States ³ Government ⁴ Agriculture
(Dept. of)
⁵ Agricultural ⁶ Marketing ⁷ Service
- (2) ¹ United ² States ³ Government ⁴ Defense ⁵ Army
(Secretary of) (Dept. of)
- (3) ¹ United ² States ³ Government ⁴ Health, ⁵ Education, ⁶ Welfare ⁷ Food ⁸ Drug ⁹ Administration
(Dept. of) (and) (and)
2. (1) ¹ Fayette ² County ³ Education
(Board of)
- (4) ¹ Virginia ² State ³ Agriculture
(Dept. of)
- (3) ¹ Versaille ² City ³ Fire
(of) (Dept.)
- (2) ¹ Ohio ² State ³ National ⁴ Guard
3. (1) ¹ Committee ² Child ³ Protection
(for)
- (3) ¹ United ² States ³ Government ⁴ Labor, ⁵ Labor ⁶ Statistics
(Dept. of) (Bureau of)
- (4) ¹ United ² States ³ Shoe ⁴ Company
- (2) ¹ Panama ² Justice
(Republic of) (Dept. of)

Student Self-Check II

ANSWER KEY

CHRONOLOGICAL FILING

2 3 1
(2) Howard E. Johnson

December 21, 19--

2 3 1
(4) Howard E. Johnson

March 2, 19--

2 3 1
(5) Howard P. Johnson

April 1, 19--

2 3 1
(1) H. L. Johnson

January 1, 19--

2 3 1
(6) Jack K. Johnson

July 6, 19--

2 3 1
(8) Joseph M. Johnson

August 31, 19--

2 3 1
(9) L. M. Johnson

August 31, 19--

2 3 1
(7) Jack K. Johnson

June 21, 19--

2 3 1
(3) Howard E. Johnson

May 15, 19--

Instruction Sheet III

ANSWER KEY

<u>Alphabetical Order</u>	<u>Letter Number</u>	<u>Name and Indexing Units</u>
1.	P-4	¹ ² ³ Adams Furniture Company
2.	P-2X	¹ ² McWilliams, John (Mrs.) SEE: McWilliams, Karen (Mrs.)
3.	P-2	¹ ² McWilliams, Karen (Mrs.) (John)
4.	P-1	¹ ² ³ New Free Press
5.	P-6	¹ ² ³ Norwood Nursing Home
6.	P-13	¹ ² ³ Robbins, A. R.
7.	P-14	¹ ² ³ Robbins, Alfred P.
8.	P-11	¹ ² ³ Smith-Gibson, Charles (Dr.)
9.	P-12	¹ ² ³ ⁴ Smith-Gibson Wholesale Outlet, December 1
10.	P-15	¹ ² ³ ⁴ Smith-Gibson Wholesale Outlet, April 23
11.	P-9	¹ ² ³ Station Travel Agency
12.	P-3	¹ ² ³ ⁴ T (and) H Wholesale Company
13.	P-10	¹ ² ³ ⁴ West Virginia State Education (Dept. of)
14.	P-5	¹ ² ³ Wichita Insurance Company
15.	P-8	¹ ² ³ Xavier, G. M. (Dr.)
16.	P-7	¹ ² ³ ⁴ Xavier, G. M., Junior

FILING ALPHABETICALLY
GOVERNMENTAL RULES
INSTRUCTOR'S MANUAL

**Materials in this Lesson
have been**

**Modified by
Sadie McLeod**

**from
Materials Developed and Graciously Provided by
Bureau of Vocational Education, State Department of Education
and
Department of Vocational Education
College of Education, University of Kentucky**

**These materials support
Performance Objectives 21, 25, 26 of the
V-TECS Secretarial Catalog**

**State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201**

**In Cooperation With
Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631**

1977

NOTES TO TEACHER

Please review this module carefully before beginning instruction. The letters contained in this package will be used in future modules. The Instructor's Final Checklist, page 60, is a perishable item and should be duplicated for your evaluation of each student's work.

To prepare this module for student use, you will need to duplicate the cross reference sheet, found in your manual, for use in Self-Check III and the Checkout Activity. Several copies per student will be needed for each activity. Other modules in packet IV will need the cross reference sheet. Plan to duplicate several copies for future use.

You will need to supply file folders for student use in completing Self-Check III and the Checkout Activity.

The key for the final Checkout Activity is included in your manual.

CROSS-REFERENCE SHEET

NAME OF SUBJECT _____

DATE OF ITEM _____

REGARDING _____

SEE

NAME OF SUBJECT _____

FINAL CHECKOUT

KEY

<u>Alphabetical Order</u>	<u>Letter Number</u>	<u>Name and Indexing Units</u>
1	F-6	¹ ² ³ Bakery, R. M. (Oct. 25) SEE: R-M Bakery
2	F-27X	¹ ² ³ Excel Home Decorators SEE: X-Cel Home Decorators
3	F-20	¹ ² ³ ⁴ Main Florist (and) Gift Shop, June 3
4	F-13	¹ ² ³ ⁴ Main Florist (and) Gift Shop, May 20
5	F-11	¹ ² ³ ⁴ Main Florist (and) Gift Shop, May 2
6	F-1	¹ ² ³ McCool, Shawn J.
7	F-30	¹ ² ³ Modern Office Procedures
8	F-21	¹ ² ³ ⁴ Nashville, First National Bank
9	F-8	¹ ² ³ ⁴ North Carolina Carpet Company
10	F-2	¹ ² ³ Northcutt, J. E.
11	F-7	¹ ² Northcutt, James
12	F-3X	¹ ² O' Brien, Damon (Mrs.) SEE: O'Bryan, Damon (Mrs.)
13	F-3	¹ ² O'Bryan, Damon (Mrs.)
14	F-4	¹ ² Pain, Tom
15	F-5	¹ ² ³ Peyton, Mary Jane (Mrs.)
16	F-24	¹ ² Police, Fraternal (Order of)
17	F-29	¹ ² ³ ⁴ Queen Anne Steam Line
18	F-23	¹ ² ³ R(-)M Bakery, Aug. 31 SEE: Bakery, R.M.
19	F-12	¹ ² ³ Rollins Printing Company
20	F-10	¹ ² ³ Rollins, Robert M.
21	F-33	¹ ² ³ Roundtown Bus Station

Key (cont'd.)

Alphabetical Order	Letter Number	Name and Indexing Units
22	F-31	1 2 3 Saint Williams Church
23	F-14	1 2 3 4 San Diego Dancers, Inc.
24	F-22	1 2 3 4 Silver Grove City Fire (Dept.)
25	F-15X	1 2 3 Smith(-)Sutter, Charles SEE: Sutter(-)Smith, Charles
26	F-28X	1 2 3 4 5 Smith(-)Sutter, Charles Publishing Company SEE: Sutter(-)Smith, Charles Publishing Company
27	F-9X	1 2 3 Smith, Thomas R. SEE: Smythe, Thomas R.
28	F-9	1 2 3 Smythe, Thomas R.
29	F-32	1 2 3 4 South Carolina State Treasurer, April 3 (Dept. of)
30	F-34	1 2 3 4 South Carolina State Treasurer, Mar. 2 (Dept. of)
31	F-25	1 2 3 4 Stockton Communications Company, Inc.
32	F-15	1 2 3 Sutter(-)Smith, Charles
33	F-28	1 2 3 4 5 Sutter(-)Smith, Charles Publishing Company
34	F-16	1 2 3 4 Thirteenth Street Antique Shop
35	F-17	1 2 3 Thomas Department Store
36	F-19	1 2 Unger, Felix
37	F-35	1 2 3 4 5 6 United States Government Interior Environment Protection (Dept. of) (Bureau of)
38	F-26	1 2 3 4 5 Van Camp('s) Farm Equipment Company
39	F-26X	1 2 3 Van Camp, Roger SEE: Van Camp('s) Farm Equipment Company
40	F-18	1 2 Welsh, Norman
41	F-27	1 2 3 4 X-cel Home Decorators